

CLAIMS

What is claimed is:

1 1. A method for affiliation management, the method comprising:
2 a step for providing a store comprising:
3 a first plurality of records each describing a respective person;
4 a second plurality of records wherein each record of the second plurality describes
5 a respective item comprising at least one of a task and an appointment;
6 indicia of associations between records of the first plurality and records of the
7 second plurality to associate at least one of attendees to appointments and assignees to tasks; and
8 indicia of a plurality of identified affiliations;
9 a step for managing user sessions, each user session identified to a respective person of
10 the first plurality of records;
11 a step for providing a first presentation in a first user session identified to a first person,
12 the first presentation comprising field values of records selected from the first plurality and the
13 second plurality in accordance with a first identified affiliation;
14 a step for providing a control in the first user session;
15 a step for creating a second identified affiliation in response to operation of the control;
16 and
17 a step for providing a second presentation in accordance with the second identified
18 affiliation in a second user session identified to a second person.

1 2. The method of claim 1 further comprising:
2 a step for managing usage rights for each session; and
3 a step for granting a usage right to the second person for creating during the second
4 session an association of the second identified affiliation to a multiplicity of the first plurality of
5 records not used in providing the first presentation.

1 3. The method of claim 1 further comprising:
2 a step for managing usage rights for each session; and

3 a step for granting a usage right to the second person for creating during the second
4 session an association of the second identified affiliation to a multiplicity of the second plurality
5 of records not used in providing the first presentation.

1 4. The method of claim 1 further comprising:

2 a step for managing usage rights for each session; and
3 a step for granting a usage right to the second person for creating during the second
4 session an association of the second identified affiliation to further indicia of association between
5 records of the first plurality and records of the second plurality.

1 5. A method for affiliation management, the method comprising:

2 a step for providing a store comprising:
3 a first plurality of records each describing a respective person;
4 a second plurality of records wherein each record of the second plurality describes
5 a respective item comprising at least one of a task and an appointment;
6 first indicia of associations between records of the first plurality and records of
7 the second plurality to associate at least one of attendees to appointments and assignees to tasks;
8 a third plurality of records each describing a charge of at least one of a time
9 period and an expense;
10 second indicia of associations between records of the first plurality, records of the
11 second plurality, and records of the third plurality; and
12 third indicia of a plurality of identified affiliations;
13 a step for managing user sessions, each user session identified to a respective person of
14 the first plurality of records;
15 a step for providing in a first user session identified to a first person:
16 a first presentation comprising field values of records selected from the first
17 plurality and the second plurality according to an identified affiliation;
18 a first control; and
19 a second control;
20 a step for creating a record of the third plurality in response to user operation of the first
21 control;

22 a step for receiving a request in response to user operation of the second control, the
23 request comprising indicia of criteria; and
24 a step for downloading in a format for accounting a multiplicity of field values of records
25 of the third plurality of records in accordance with the criteria.

1 6. A method for affiliation management, the method comprising:

2 a step for providing a store comprising:

3 a first plurality of records each describing a respective person;

4 a second plurality of records wherein each record of the second plurality describes
5 a respective item comprising at least one of a task and an appointment;

6 indicia of associations between records of the first plurality and records of the
7 second plurality to associate at least one of attendees to appointments and assignees to tasks; and
8 indicia of a plurality of identified affiliations;

9 a step for managing user sessions, each user session identified to a respective person of
10 the first plurality of records;

11 a step for providing a first presentation in a first user session identified to a first person,
12 the first presentation comprising a first multiplicity of field values of records selected from the
13 first plurality and the second plurality in accordance with a first identified affiliation; and

14 a step for providing a second presentation in a second user session identified to a second
15 person, the second presentation comprising a second multiplicity of field values of records
16 selected from the first plurality and the second plurality in accordance with a second identified
17 affiliation; wherein the second multiplicity includes at least one field value of the first
18 multiplicity and at least one field value not of the first multiplicity.

1 7. A method for affiliation management, the method comprising:

2 a step for providing a store of identified affiliation information, the store comprising:

3 a first plurality of records each describing a respective person;

4 a second plurality of records wherein each record of the second plurality describes
5 a respective item comprising at least one of a task and an appointment;

6 indicia of associations between records of the first plurality and records of the
7 second plurality to associate at least one of attendees to appointments and assignees to tasks; and

indicia of a plurality of identified affiliations;
a step for managing user sessions, each user session identified to a respective person of the first plurality of records;
a step for providing a first presentation in a first user session identified to a first person, the first presentation comprising field values of records selected from the first plurality and the second plurality in accordance with a first identified affiliation;
a step for providing a control in the first user session for beginning a chat session; and
a step for providing a list of persons identified to other active user sessions selected from records of the first plurality in accordance with the criteria of the first identified affiliation.

8. The method of claim 7 wherein:

the store further comprises indicia of a project identified to a first multiplicity of records of the first plurality and to a second multiplicity of records of the second plurality to associate at least one of attendees to appointments and assignees to tasks; and
the list is further selected in accordance with indicia of the project.

9. A store comprising:

a first plurality of records each describing a respective person;
a second plurality of records wherein each record of the second plurality describes a respective item comprising at least one of a task and an appointment;
indicia of associations between records of the first plurality and records of the second plurality to associate at least one of attendees to appointments and assignees to tasks;
a third plurality of records each describing a note;
indicia of associations between records of the third plurality and at least one of records of the first plurality and records of the second plurality;
indicia of subject for associating records of the first plurality, the second plurality, and the third plurality, each respective association in accordance with a common subject; and
indicia of affiliations, each affiliation being associated with a multiplicity of the first plurality, the second plurality, and the third plurality of records.

1 10. The store of claim 9 wherein the common subject comprises indicia of a person of the first
2 plurality of records.

1 11. The store of claim 9 wherein the common subject comprises a indicia of an item of the
2 second plurality of records.

1 12. The store of claim 9 wherein:
2 the store further includes indicia of a project identified to a first multiplicity of records of
3 the first plurality and to a second multiplicity of records of the second plurality to associate at
4 least one of attendees to appointments and assignees to tasks; and
5 the common subject comprises indicia of the project.

1 13. A method for affiliation management, the method comprising:
2 a step for providing a store comprising:
3 a first plurality of records each describing a respective person;
4 a second plurality of records wherein each record of the second plurality describes
5 a respective item comprising at least one of a task and an appointment;
6 indicia of associations between records of the first plurality and records of the
7 second plurality to associate at least one of attendees to appointments and assignees to tasks; and
8 indicia of a plurality of identified affiliations;
9 a step for providing a first presentation comprising field values of records selected from
10 the first plurality and the second plurality in accordance with a first identified affiliation and a
11 first aggregation;
12 a step for receiving a request to edit a field value of a record of the store thereby creating
13 a modified field value; and
14 a step for providing a control comprising a list of alternate aggregations for user
15 activation in place of the first aggregation, the list including a particular aggregation operative in
16 accordance with the modified field value.

1 14. The method of claim 13 wherein the method further comprises a step for creating the
2 particular aggregation.

1 15. The method of claim 13 wherein the modified field value comprises indicia of a person of the
2 first plurality of records.

1 16. The method of claim 13 wherein the modified field value comprises indicia of an item of the
2 second plurality of records.

1 17. The method of claim 13 wherein:
2 the store further includes indicia of a project identified to a first multiplicity of records of
3 the first plurality and to a second multiplicity of records of the second plurality to associate at
4 least one of attendees to appointments and assignees to tasks; and
5 the modified field value comprises indicia of the project.

1 18. A method for communicating among users of a plurality of users, the method performed by a
2 server, the method comprising:

3 providing a list of items to any particular user of the plurality, wherein:

4 each item is of a common type, the common type being of a set of types including
5 a contact, an appointment, and a task; and

6 each item is associated with a respective set of controls, wherein:

7 each respective set of controls comprises respective controls of
8 common appearance as respective controls of each other set of controls; and

9 each respective control of each set, when activated by a user,
10 performs a function in accordance with the item to which it is associated; and

11 accepting input of the particular user to activate a particular control to facilitate at least
12 one of the creation of a new item, accessing a created item, and accessing a second list of created
13 items, the second list prepared according to the method.

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1 19. The method of claim 18 wherein the control comprises an icon having a multiplicity of
2 appearances, each appearance conveying a status of a second item accessible via activation of the
3 icon.

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1 20. A memory device comprising instructions for performing the method of claim 18.